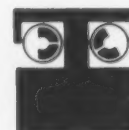


TRAVEL PRINTOUT



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U.S.
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Center



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OPTIMISTIC 1984 OUTLOOK FOR TRAVEL AND TOURISM RELEASED

Assured that the fences have been mended, the travel industry looks to 1984 with unabashed enthusiasm according to the 1984 Outlook for Travel and Tourism, the proceedings of the U.S. Travel Data Center's 1984 Travel Outlook Forum held in December at the Marriott Crystal Gateway Hotel in Washington, D.C. The forum examined travel during 1983 and the prospects for travel in 1984.

In the 1984 Outlook, to be released by the U.S. Travel Data Center on January 31, Dr. Douglas Frechtling, director of the Washington-based travel research center, labels 1983 an "unexceptional year marked by slow gains in air travel and no discernible change in the volume of trips compared to 1982." On the brighter side, Frechtling notes travel industry receipts rose almost 10 percent in 1983. Moreover, while Americans took no more trips than the previous year, they increased the average length of stay away from home by 3.5 nights per trip.

Looking toward 1984, Dr. Frechtling comments, "As jobs and income continue to increase at high rates, prices remain relatively stable and replacement of necessary consumer goods is satisfied, Americans will once again turn to their favorite use of vacation time: travel away from home."

The 200-page 1984 Outlook also includes forecasts for specific travel industry sectors including international visitation, air and ground transportation, accommodations, attractions, and business travel.

Chase Econometrics Chairman Lawrence Chimerine predicts that the economic recovery will be slow, with real GNP growing an average 4 percent by the end of 1984. Tax cuts, lower infla-

tion and expanding employment, however, will cause consumer spending to remain strong.

On international travel, Don Wynegar, director of the office of research for the U.S. Travel and Tourism Administration, notes that 1983 posted tremendous growth in outbound travel, a surge that will subside as the dollar (Continued on Page 3)

TRAVEL AD SPENDING INCREASES \$100 MILLION

1982 travel advertising spending in measured media by airlines, travel destinations and steamship lines showed their largest annual gain since 1978, according to a new study of travel advertising spending released by Ogilvy & Mather Advertising.

The latest volume of "Trends in Travel and Tourism Advertising Expenditures in U.S. Measured Media - 1978-1982" shows a total of \$640 million spent in 1982 as against \$540 million in 1981, with the largest yearly increase by the steamship lines. This category increased its spending by 57 percent going from \$27 million in 1981 to \$63 million in 1982.

The largest expenditure, however, is still that of the airlines, \$420 million by U.S. flag carriers plus another \$53 million by foreign flag carriers. Total airline advertising expenditures increased 18 percent in 1982 over 1981.

The new Ogilvy and Mather report contains a detailed analysis of these advertising expenditures plus those of U.S. states and foreign destinations. Copies are available for \$25 each, prepaid, from Ms. Debby Dunphy, Ogilvy & Mather Advertising, Inc., 2 East 48th Street, New York, N.Y. 10017.##

TRAVEL PRICES FALL IN NOVEMBER

Led by declining gasoline and lodging prices, the cost of travel in the U.S., as measured by the U.S. Travel Data Center's Travel Price Index (TPI), fell 0.2 percent in November 1983.

For comparison, the Consumer Price Index (CPI) rose 0.2 percent on a seasonally unadjusted basis in November, down slightly from the 0.3 percent rise during October.

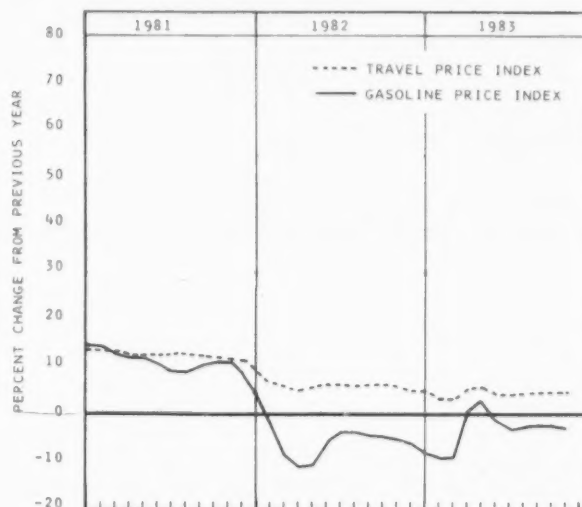
The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, stood at 354.7 in November (1967=100).

The price of gasoline dropped 1.2 percent, while the cost of lodging out of town fell 1 percent, prompting the overall decrease in travel costs. Moreover, both intercity rail and bus fares posted slight declines.

Airline fares grew 1.2 percent to lead all other TPI components, followed by the taxicab fares which increased 0.5 percent.

The TPI has increased 3.6 percent

since October of last year, slightly more than the 3.2 percent growth registered by the CPI during the same period. Intercity bus fares have jumped 11.3 percent during the past year to lead all other components. On the other hand, gasoline prices are 2.6 percent below November 1982 levels.##



GASOLINE PRICES CONTINUE TO DECLINE IN NOVEMBER.

Monthly and Annual Rates of Change in the Travel Price Index and Components, November, 1983

TPI Component	Monthly Percent Change	Annual Percent Change
	October, 1983 to November, 1983	November, 1982 to November, 1983
Transportation	0.0	1.6
Airline Fares	1.2	4.9
Intercity Bus Fares	-0.4	11.3
Intercity Train Fares	-0.2	4.7
Taxicab Fares	0.5	1.4
Gasoline	1.1	-2.6
Lodging	-1.0	6.1
Food Away From Home	0.3	4.3
Entertainment Services	0.3	5.0
Incidentals	0.0	3.0
TRAVEL PRICE INDEX	-0.2	3.6
CONSUMER PRICE INDEX	0.2	3.2

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research, 1899 L Street, N.W., Washington, D.C. 20036. Telephone number, (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for \$45 per year, U.S., Canada, and Mexico; other foreign countries, \$55 per year, payable in U.S. funds only.

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TRAVEL DECLINES 4 PERCENT IN OCTOBER

Travel in October declined nearly 4 percent from year-earlier levels, the U.S. Travel Data Center announced today.

According to the non-profit research center, which conducts the monthly National Travel Survey, U.S. residents took 80.9 million person-trips in October 1983 but increased the average stay by one night, continuing a trend toward longer trips begun in February 1983. (A person-trip is measured each time a person goes 100 miles or more away from home).

The monthly telephone survey reported travel for pleasure and vacation purposes fell substantially, although the decline was cushioned by increases in the length of stay. Travel for business purposes and attending conventions, which has been depressed since the beginning of the year, surged in October. Moreover, the duration of business/convention trips increased 7 percent.

Underscoring the trend toward trips of longer duration, weekend travel fell 29 percent in October, continuing a four-month decline.

Travel by auto, truck and recreational vehicle fell 16 percent. Despite the overall decline, air travel increased for the eighth consecutive month.

Vacation travel plans posted a modest increase over the level recorded in October 1982. Thirty-six percent of the U.S. adult population intends to take a vacation trip in the next six months, 4 percent more than one year ago.

Data Center Assistant Director Suzanne Cook noted "Twenty-two percent of these vacation planners have already made their travel arrangements, an increase of more than one-third over last year's levels. This is an encouraging sign that travel is returning to the higher levels we measured before the 1981-82 recession."##

OUTLOOK (CONTINUED FROM PAGE 1)

depreciates. Wynegar expects more Americans will be encouraged to travel in the U.S. in 1984, attracted by the 1984 Summer Olympic Games and the Louisiana World Exposition in New Orleans.

The 1984 Outlook for Travel and Tourism will contain over 200 pages of narrative, tables and charts on the prospects for travel in 1984. It is being sent to Data Center members and is available to others for \$85.00 prepaid from the U.S. Travel Data Center, 1899 L Street, N.W., Washington, D.C. 20036.##

VISITOR VOLUME AT NATIONAL PARKS

Region	October, 1983 visits ¹ (thousands)	Change from September, 1983 (percent)	Change from October, 1982 (percent)	1983/82 Year- to-date (percent)
New England	1,449.6	-16.1%	18.4%	12.9%
Eastern Gateway	884.4	-44.4	-5.3	2.7
G. Washington Country	5,691.4	-4.7	7.4	2.0
The South	5,327.1	0.9	6.7	7.7
Great Lakes Country	351.5	-29.1	3.9	12.0
Mountain West	1,077.4	-56.6	12.1	6.1
Frontier West	1,168.4	17.2	-5.3	-0.4
Far West	3,516.8	-29.3	1.2	-4.7
The Islands	147.9	14.5	-12.9	-4.6
TOTAL	19,659.5	-17.1%	4.1%	2.5%

¹Preliminary; adjusted for differences in reporting units.

Source: National Park Service

States comprising the travel regions:

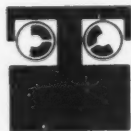
NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. EASTERN GATEWAY: New York, New Jersey. GEORGE WASHINGTON COUNTRY: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia. SOUTH: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee. GREAT LAKES COUNTRY: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin. MOUNTAIN WEST: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming. FRONTIER WEST: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas. FAR WEST: Alaska, California, Idaho, Nevada, Oregon, Washington. THE ISLANDS: American Samoa, Guam, Hawaii, Northern Marianas, Puerto Rico, Virgin Islands.

CURRENT TRAVEL INDICATORS

	October, 1983	% Change from September, 1983	% Change from October, 1982	Year-to-date % Change 1983/1982
<u>Establishment receipts or retail sales</u>				
Hotels, motels and other lodging places ¹	\$ 2,587 million	2.1	11.3	6.8
Eating and drinking places ²	\$10,211 million	0.6	9.5	11.8
Gasoline service stations ²	\$ 8,886 million	0.0	1.6	-0.9
<u>Commercial lodging demand</u>				
Hotel/motel occupancy rate ³	N/A	N/A	3.9	0.5
Real demand for commercial lodging ⁴	\$ 956 million	7.4	3.4	0.9
<u>Airline passenger traffic⁵</u>				
Domestic revenue passenger-miles	15.2 billion	7.2	5.2	6.1
International revenue passenger-miles	4.6 billion	-6.0	17.3	10.7
<u>Bus passenger traffic⁶</u>				
Intercity bus passenger-miles	N/A	N/A	N/A	N/A
<u>Highway traffic volume⁷</u>				
Rural arterial vehicle-miles	37.8 billion	0.9	5.4	4.2
<u>Rail passenger traffic⁸</u>				
Amtrak passenger-miles	304.5 million	-10.5	-4.4	3.3
<u>Travel Price Index⁹</u>				
Travel Price Index	355.3	0.1	3.1	3.3
<u>U.S. resident travel¹⁰</u>				
Total person-trips	80.9 million	-22.0	-3.7	-0.6
Vacation person-trips	40.1 million	-35.4	-22.0	-2.0
<u>Public use of National Parks¹¹</u>				
Visits	20,261,859	-18.6	1.0	0.0
Overnight stays	1,031,239	-44.6	1.0	-5.0
<u>Foreign arrivals in U.S.¹²</u>				
From overseas	N/A	N/A	N/A	N/A
From Canada	914,553	-11.8	49.2	16.8
<u>U.S. citizen departures¹²</u>				
To overseas	N/A	N/A	N/A	N/A
To Canada	726,144	-41.2	2.2	-0.4
<u>Domestic demand for motor gasoline¹³</u>				
Barrels per day	6,719 thousand	0.4	5.1	1.1

¹Source: Laventhol and Horwath, seasonally unadjusted. ²Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. ³Source: Laventhol and Horwath, seasonally adjusted. ⁴Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. ⁵Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. ⁶All carriers regular route and charter service. Source: American Bus Association. ⁷Source: Federal Highway Administration. ⁸Source: National Railroad Passenger Corporation (Amtrak). ⁹Source: U.S. Travel Data Center and Bureau of Labor Statistics. ¹⁰Source: U.S. Travel Data Center. ¹¹Preliminary; unadjusted for differences in reporting units. Source: National Park Service. ¹²Source: U.S. Travel and Tourism Administration and Nettelton Travel Research Center. ¹³Preliminary; Source: U.S. Department of Energy.

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